

Last Updated: August 28, 2018

Reviewing Staff Development Reimbursement Requests

When an employee submits a reimbursement request for Computer Hardware and Mobile Device the request is now electronically submitted to a senior manager for review. When submitting the request, employees must enter the email address for a manager with authority to review and validate the expenses as job related. The current MOU language for all bargaining units (except DSA) requires that the computer or mobile device will be used 50% of the time for work related activity in the employee's position in the department.

Step 1:

You will receive an email alerting you that a new staff development form has been submitted for your approval.

Sonoma-County-eF... New Staff Development Form submitted for Approval
Staff Development Form Submitted for Approval Hello, A new Staff Development

To open the request for review, select the "Access the Request" as indicated below:



Staff Development Form Submitted for Approval

Hello,

A new Staff Development Form has been sent for your review and approval. Please click the link below to access the request.

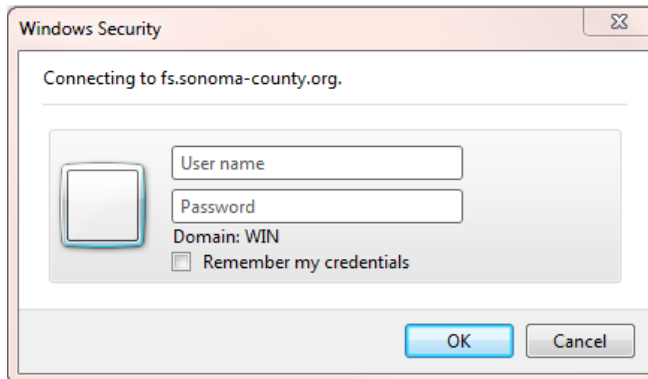
[Access the Request](#)



Step 2:

Sign into the program using your network User Name and Password

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****Please note – if you use Firefox (or if you are logging in from home), you will need to add win\ before your User Name such as win\JaneDoe

Step 3:

Review the submission and evaluate whether to approve, deny, or modify the request. Employees are required to upload proof of payment for expenses – to review select the “attachments” tab.

Staff Development / Wellness Reimbursement Request - In Progress

Staff Development / Wellness Reimbursement Request	
Employee ID # 12345	Employee First Name Jane
Employee Last Name Doe	Department HR
Employee Email jane.doe@county.org	Day Phone 707-565-5555
Bargaining Unit # SEIU 0025	FTE 1
(Does not include pending claims) Staff Development Available Balance 500	

Summary

Attachments

Summary

Show detailed result

+ Submission Submitted & TAP Signed

Completed Stages:

Submission: ✓ 01/03/2018 14:15:42 - D

To view the attachments, review the “Uploaded Files” section. Select the three dots (...) next to the name of the file you wish to view and choose “Download”

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Summary **1** Attachments **0** Communications

e-Signature documents

Name	Status	Creation Date	Download
No items to display			

Uploaded Files

Refresh Grid Data

Name	Uploaded by	Version	Source
Staff Development Reimbursement.docx	Jane Doe	1	Generic

1 - 1 of 1 items

Select files...

Actions

- Download Merged
- View Merged
- Download
- Versions
- Edit
- Delete

You will be prompted to “open” or “save” the attachment – select “Open” to review the proof of payment.

Step 4

“Approve”, “Deny”, or “Modify” the request. Please make sure to enter comments in the event of denial or modification such as: Not a work related expense.

Department Head / Senior Manager Approval

Approval *

Approve

Modifications, Comments / Recommendations

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Step 5

Complete the signature portion of the request – select the radio button to reflect whether you are a Department Head or a Senior Manager. Complete your title. Accept the typed digital signature to reflect your confirmation (your identity is validated by your network sign on). You may also choose to draw your signature. Select “Submit” – this will generate an email to the employee updating their claim status. It will also route the Staff Development Reimbursement Request electronically to Human Resources Staff Development for final review and processing.

Signer's Role *

☒ Department Head ☐ Senior Manager

Signer's Job Title *

Signature Field

Department Head

Department Head

Type Draw

Clear

Submit